

Platinum Sponsor

**ValueOps**  
by Broadcom

**Rally** **Clarity**  
by Broadcom by Broadcom



**rego**University

SAN DIEGO • 2023

# Financial Management Round Table

**Your Guides:**

Wes McCoubrie and Karen Lifsey

# Introductions

---

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

# Part I: Introduction

# Agenda

---

- An outlines of topics will be presented for discussion.
- We are not limited by these topics, as their purpose is to ‘spark’ the conversation.

Please:

- Participate and share your insight.
- This is an opportunity to interact with peers and share challenges, issues. Resolutions and successes.
- If there are questions very specific to your organization, we can discuss directly afterwards or within the Labs

# Possible Discussion Points

---

- What Financial information are you being asked to provide to enable:
  - Project Managers or Scrum Masters
  - Business Partners
  - Finance
  - Executives
- Are you forecasting, on what cadence?
- How are you defining rates for Forecasts?
- What Grouping attributes are you utilizing?

# Possible Discussion Points

---

- Are you bringing in actual costs, Labor, Non-Labor? How?
- Do you have or want a GL integration for Non labor activity?
- Are you tracking time for Labor Costing? In Clarity or elsewhere?
- Is Clarity being leveraged in Planning or Budgeting activities?
- Are you using Clarity for capitalization?
- What gaps are you encountering in your finance/costing efforts within Clarity

# Questions?



# Surveys

Please take a few moments to fill out the class survey.  
Your feedback is extremely important for future events.





# Thank You For Attending Rego University

## Instructions for PMI credits

- Access your account at [pmi.org](https://pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
Don't forget to fill out the class survey.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)